

DISTRICT OF COLUMBIA PUBLIC SCHOOLS

**PeopleSoft Human Resources,
Benefits and Payroll**



**Employee PeopleSoft
Go-Live Reference Guide
April 20, 2009**



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PeopleSoft Human Resources, Benefits, and Payroll
Employee Reference Guide

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I. Introduction and Purpose of this Guide

Introduction

The current District of Columbia Public Schools (DCPS) Human Resources and Payroll system, known as CAPPS, has served the District of Columbia Public Schools (DCPS) for many years. The CAPPS system has been retired and replaced by the PeopleSoft Human Capital Management (HCM) system. The PeopleSoft system is a state-of-the-art Human Resources, Benefits, and Payroll solution. The Government of the District of Columbia successfully deployed the PeopleSoft system to most District Government agencies and The University of the District of Columbia (UDC) in 2007. Now DCPS is joining the rest of the District's agencies utilizing the PeopleSoft system. Upgrading DCPS to the PeopleSoft system will significantly improve efficiency and reduce the processing time for personnel, benefits, and payroll-related transactions. The first live payroll checks produced on the PeopleSoft system will be produced on May 8, 2009.

Purpose of this Guide

The purpose of this guide is to inform you of the significant changes that may/may not impact your personal information, benefit deductions and various factors relating to your pay as a result of aligning DCPS operations with the policies and practices of the Office of Pay and Retirement Services (OPRS) and the District of Columbia Department of Human Resources (DCHR).

In addition to implementing the PeopleSoft system, DCPS has modified its business processes to align with the policies and business practices of the District Government. To this end, the human resources and benefits policies have been aligned with DCHR. The payroll procedures have also been aligned with OPRS.



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II. Benefits of the PeopleSoft System to DCPS Employees

The Benefits of PeopleSoft to DCPS Employees

Upgrading DCPS to the PeopleSoft system will provide DCPS employees with access to PeopleSoft's Employee Self Service (ESS) system. The Employee Self Service system will enable DCPS employees to:

- View Benefit Information
- View Paychecks
- View/Change Personal Information
- View/Change Tax Withholding Information
- Review compensation history
- Preview the time that was approved and ready for payroll processing

PeopleSoft is a secure web-based system that will allow DCPS Employees to access employee records 18 x 7. DCPS employees can access the PeopleSoft Self Service module from any computer within the District of Columbia government network. The PeopleSoft Self Service module is available from 4am to 10pm, seven days a week.

In addition to providing DCPS employees with access to Employee Self Service, the PeopleSoft system will improve efficiency and reduce the processing time for personnel, benefits, and payroll-related transactions. By implementing PeopleSoft, DCPS will be able to improve the timeliness of HR and Payroll support to DCPS employees.

III. Business Process Changes

During the course of the implementation of the PeopleSoft system, DCPS conducted an extensive review of business processes and identified ways to improve the accuracy and efficiency of managing human resources, benefits and payroll information. To this end, DCPS has revised its business processes to improve business operations. The changes to business processes that affect you as an employee are detailed in the following sections of this guide.



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A. Personal Data Management

1. Updating Personal Data using PeopleSoft Employee Self Service (ESS)

You will be able to change personal information such as addresses, phone numbers, direct deposit allotments or tax withholding allowances directly in PeopleSoft using the PeopleSoft Employee Self Service (ESS) module. Employees will be able to access the PeopleSoft system from any computer on the DC Government network. Employees will not be able to access the PeopleSoft system from outside of the DC Government network.

2. Last 4 Digits of Checking and Savings Account Numbers will Display on the Earnings Statement.

For security reasons, only the last 4 digits of bank account information will be displayed on the new Earnings Statement. The limitation of bank account information to a 4 digit only display will protect the privacy of bank account information.

B. Benefit Plans

1. New System of Record for Employee Benefit Records

With the deployment of the PeopleSoft system, the benefit records listed in PeopleSoft Employee Self Service will become the system of record for benefit plans. Employees are encouraged to access the PeopleSoft Employee Self Service module to review benefit plan records.

C. Benefit Deductions

1. Benefit Deduction Amounts for 10 Month Employees will be Based on 22 Pay Periods

Previously in CAPPS, benefit deductions for 10 month employees were based on 26 pay periods. Now in PeopleSoft, benefit deductions for 10 month employees will be based on 22 pay periods. Effective with the May 22, 2009 paycheck, 10 month employees will see an increase in benefit deductions. However, benefit coverage will continue for the full 12 month cycle. In addition, under this new policy, 10 month employees will no longer need to make benefit payments during the summer months to continue benefits. Benefits will automatically be continued as premiums for the full year have been paid under the 10 month premium calculation. All medical, dental, disability and life insurance benefit premiums will be annualized and calculated using a 10 month premium billing cycle.

Note: This policy is not applicable to a leave of absence or other types of leave that occur during the normal 10 month pay cycle. The benefit coverage policy for a leave of absence or other formal leave programs will be governed by the benefit coverage policy for that particular leave program.



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2. District Optional Life Insurance Benefit Coverage and Deduction Calculation

Previously in CAPPs, District Optional Life Insurance benefit coverage amounts were previously calculated based on age at the beginning of the current pay period. Now in PeopleSoft, District Optional Life Insurance benefit coverage amounts are determined based on age as of December 31st of the prior calendar year. Based on this new calculation method, minor differences in the deduction amount can be expected.

3. Basic Life Insurance Benefit Coverage and Deduction Calculation for Part-Time Employees

Previously in CAPPs, Basic Life Insurance benefit coverage amounts were reduced based on prorating part-time tour of duty hours. Basic Life Insurance deductions were calculated based on this reduced benefit coverage amount. Now in the new PeopleSoft system, benefit coverage amounts will not be reduced based on part-time tour of duty hours. Benefit coverage will be increased based on full-time tour of duty. Under this new benefit coverage calculation, minor differences the benefit deduction amount can be expected.

4. Changes to Basic Life Insurance Deduction Amounts Due to Rounding

Previously in CAPPs, an employee's base salary for basic life insurance was rounded up to the next \$1000 and an additional flat amount of \$2,000 was added to calculate the basic life insurance benefit amount. Now in the PeopleSoft system basic life insurance benefit amounts are rounded up to the next \$1000 and an additional flat amount of \$2,000 is still added. Under this new benefit coverage calculation, minor differences in the benefit deduction amount can be expected.

5. Changes to Basic Life Insurance Deductions Due to Decimal Places

Previously in CAPPs, basic life insurance deductions were calculated to 2 decimal places. Now in PeopleSoft basic life insurance rates are calculated to 4 decimal places. Under this new benefit coverage calculation, basic life insurance benefit deductions will be adjusted accordingly. Minor differences in the benefit deduction amount can be expected.

6. Ten Month Deduction Billing Period for Teacher Aids

Previously in CAPPs, benefit deductions for 10 month Teacher Aids were calculated based on 26 pay periods over a 12 month period. DCPS has converted 10 month Teacher Aids to a 10 month benefit billing period. Under this 10 month billing period, benefit premiums will be annualized and divided by a 10 month deduction period (22 pay periods). This change in benefit deduction calculations will be effective with the paycheck dated May 22, 2009. Due to the fact that this mid-year benefit policy change will result in a short-fall of premiums owed, DCPS will absorb this cost. DCPS will not take action to recover the short-fall of premium deductions.

7. Flexible Spending Account (FSA) Deduction Amount Changes – 10 Month Employees

Previously in CAPPs, Flexible Spending Account (FSA) deduction amounts were calculated using 26 pay periods. FSA deduction amounts will now be calculated based on 22 pay periods. Based on this change, FSA deduction amounts will increase effective with the paycheck dated May 22, 2009.

8. Short-Term Disability (STD) and Long-Term Disability (LTD) Benefit Deduction Changes

Previously in the CAPPs system, Short-Term Disability (STD) and Long-Term (LTD) Disability benefit deductions were calculated based on age of the employee at the beginning of the pay period. Now in the PeopleSoft system, STD and LTD benefit deductions are calculated based on the age of the employee as of January 1st of the calendar year. This change in age calculation will



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change the way STD and LTD benefit deductions are calculated. Minor differences in the benefit deduction amount can be expected.

9. Part-Time Employee Federal Benefit Deductions

Under the new PeopleSoft system, deductions for Federal benefits for part-time employees will be assessed based on the proration guidelines outlined in the Federal Employees Health Benefits Program Handbook. This change in policy will result in part-time employees under federal benefits paying a greater share of benefit costs. Contribution rates for part-time employees with Federal benefits can be found at: <http://www.opm.gov/insure/health/08rates/index.asp>. Employees can also reference the Guide to Federal Employees Health Benefits Plans at: <http://www.opm.gov/insure/health/reference/handbook/FEHB03.asp>

D. Leave Plans

1. Leave Balances

Please review the leave balances on the Earnings and Leave Statement. For employees that believe that their leave balances are incorrect, please report this issue to DCPS Central Payroll for research and validation. Once DCPS Central Payroll confirms that a leave balance requires modification, the leave balance will be adjusted to reflect the correct balance.

2. Negative Leave Balances

DCPS will adhere to District policy and will not grant paid leave to employees with negative leave balances in the relevant leave category. Employees with a negative vacation leave balance will not be able to take paid vacation. Employees with a negative sick leave balance will not be able to use their personal sick leave to receive paid leave.

The upgrade will not change how much leave you have available. The leave balance you had in CAPPS, the previous human resources and payroll system, will be the same in PeopleSoft. Also, having negative leave in one type of leave does not mean you cannot use another type of leave. For example, if you have negative vacation leave but positive sick leave, you will still be able to take personal sick leave if you get sick.

3. Restored Leave Balances

Restored leave balances will now displayed at the bottom of the Earnings Statement in the Restored Leave column.

E. Occupying Multiple Jobs / Receiving Multiple Checks

1. Receiving Separate Paychecks / Direct Deposit Allocations for Separate Jobs

In CAPPS some employees were accustomed to receiving more than one paycheck during a pay period. In the PeopleSoft system, all payroll compensation owed by the District will be issued in a single paycheck. All general deductions such as union dues, parking, savings bonds, child support, One Fund, PAC, SFC will be deducted from the combined check.



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Deductions that are percentage based, such as garnishments, will be calculated based on total compensation for all jobs.

Direct deposit allocations will be processed based on the direct deposit set up associated with the employee's primary (or main) job.

Employees' total compensation will be annualized and subject to taxation in compliance with IRS rules that are contained in a federal government document published by the Internal Revenue Service (IRS) called the "Circular E - Employer's Tax Guide".

Employees determine how much federal and state taxes should come out of their payroll check through filing of W4 and state tax allowance forms. There are online tools available that can assist you in determining your tax exemptions and allowances:

www.irs.gov/individuals/page/0,,id=14806,00.html

www.kiplinger.com/tools/withholding/index.php

There are also online tools that can assist you in seeing how varying tax exemptions affect your net pay, such as: <http://www.paycheckcity.com/copaycycle/netpaycalculator.asp>

You may wish to consult with someone who prepares taxes in order to estimate how changing your tax allowances will affect your tax withholding amount.

You may use PeopleSoft Employee Self Service to submit changes on-line to your W4 and State tax allowances. Changes that you submit will be applied on the next payroll.

F. Overtime Pay

1. Premium Pay and Overtime Pay Processing

If an employee has a difference in overtime calculations than previous paychecks, the employee should contact DCPS Central Payroll to have the overtime calculations reviewed.

G. Teacher Summer Pay Credit

1. Summer Pay Credit Balance

For teachers receiving summer pay credit, summer pay credit balances will be displayed on the new Earnings and Leave Statement.

H. Instructional Aid Pay

1. Extra Duty Pay for Instructional Aids



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Previously in CAPPS, Instructional Aids were paid \$15 in Extra Duty Pay (Administrative Pay) for compensation. The \$15 Extra Duty Pay has been eliminated and replaced by compensation for actual hours worked. In the new PeopleSoft system, Instructional Aids will be paid for all hours worked. Hours that are worked, up to forty (40) in a work week, will be paid at the regular hourly rate. Any hours worked in a work week that exceed forty (40) working hours, will be paid at one and a half times the regular hourly rate.

2. Extra Duty Pay and Multiple Checks

Previously in CAPPS, employees that received extra duty pay were paid with a separate check. With the elimination of extra duty pay, all compensation earned by Instructional Aids will be paid on 1 check. This combined pay will be annualized and subject to taxation accordingly.

I. Net Pay

1. Difference in Net Pay due to Increased Gross with Combined Checks

In CAPPS some employees were accustomed to receiving more than one paycheck during a pay period. In the PeopleSoft system, all payroll compensation owed by the District will be issued in a single paycheck. This will increase gross earnings and may result in higher tax withholdings which could affect overall net pay. Employees may wish to consult a tax advisor about how to adjust Federal and State tax exemptions. See *Section E. Occupying Multiple Jobs / Receiving Multiple Checks*.

2. Difference in Net Pay Amount

Previously in CAPPS, pay stubs displayed net earnings as the amount received after all allotments were deducted from gross pay. The new PeopleSoft system will display net pay and not the net of the gross less any allocations. .

3. Differences in Net Pay for Salaried Employees due to Rounding

The CAPPS payroll system applied different rounding calculations than the new PeopleSoft system. Accordingly, employees may have minor differences in net pay produced under the PeopleSoft system compared to net pay calculated in the CAPPS system.

J. Tax Allowances and Withholding Amounts

1. Differences in Tax Withholding Amounts

The CAPPS payroll system applied different rounding calculations than the new PeopleSoft system. Accordingly, employees may have minor differences in tax withholding amounts in the new PeopleSoft system. Please access the PeopleSoft Employee Self Service system to view or make changes to tax withholding allowances.

2. Virginia Tax Withholding Amounts



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The CAPPS payroll system applied different tax calculations than the new PeopleSoft system for Virginia state tax withholding. The PeopleSoft system calculates Virginia withholding taxes based on the Virginia tax withholding code. Under the Virginia tax withholding code, marital status is not a factor in calculating state withholding tax. Minor differences in Virginia tax withholding amounts can be expected.



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K. New PeopleSoft Earnings & Leave Statement

1. Pay Begin & End Dates
2. Employee ID, Department, Job Title
3. Employment Information
4. Federal and State Withholding Status
5. Hourly Rate, Current Hours, Current Earnings, YTD Hours, and YTD Earnings
6. Tax Withholding Detail
7. Deductions Withheld from Before-Tax Earnings
8. Deductions Withheld From After-Tax Earnings
9. Detailed Employer Paid Benefits Information
10. Fed Taxable Gross: Total Gross Earnings Minus Before-Tax Deductions (Detailed in the Before-Tax Deductions Section)
11. Total Gross: Total Earnings from the Hours and Earnings Section
12. Total Taxes: Total from the Taxes Section
13. Total Deductions: Sum of the Before-Tax and After-Tax Deductions Sections
14. Net Pay: Sum of Net Pay Received
(YTD Net Pay Amount will display starting in January 2010)
15. Leave Balances
16. Direct Deposit Information
17. Summer Pay Credit Current and YTD Amounts

Government of the District of Columbia 441 4th Street, NW, Suite 480 North Washington, DC 20001-2725				Pay Group: S10-Public School 10 Month Employees Union: 0205 MAA Pay Begin Date: 01/04/2009 1 Advice #: 00023896 Pay End Date: 01/17/2009 Check Date: 01/30/2009			
Name: Jane M. Smith Employee ID: 99997908 Department: 2 GA30000261 DC Elementary Job Title: 3 TEACHER, ELEMENTARY		LEI: 11/01/2005 Appt Dt: 11/01/2005 Ret Plan: Q-8TBT Med Health Plan: MDIDCH Salary: \$43,386.00 Sal Admin Plan: ED0205 Grade: 15 3 Step: 3		TAX DATA: Federal DC State Tax Status: Single Single Allowances: 3 4 3 Addl. Pct. 4 1 Addl. Amt:			
HOURS AND EARNINGS							
		----- Current -----		----- YTD -----			
Description	Rate	Hours	Earnings	Hours	Earnings		
Regular Earnings	20.858654	72.00	1,501.83	312.00	6,507.99		
Sick Leave Taken	20.858654	8.00	166.87	16.00	333.74		
5							
Total:		80.00	1,668.70	328.00	6,841.73		
TAXES							
Description	Current	YTD					
Fed Withholding	131.23	656.79					
MED/EE	21.71	111.21					
DC Withholding	64.00	322.81					
6							
Total:		216.94	1,090.81				
BEFORE - TAX DEDUCTIONS			AFTER - TAX DEDUCTIONS				
Description	Current	YTD	Description	Current	YTD		
MDIPA DC	37.89	186.51	DC Basic Life	2.90	14.50		
Teachers Ret 8 %w/Medicare	133.50	667.50	A.F. of Teachers Local No. 6	29.61	148.05		
7							
Total:		171.39 854.01	Total:		32.51 162.55		
FED TAXABLE GROSS			TOTAL GROSS				
Current:	1,497.31	1,668.70					
YTD:	10 7,669.56	11 8,523.57					
TOTAL TAXES			TOTAL DEDUCTIONS				
Total:			Total:				
216.94			1,016.56				
12 1,090.81			13 1,016.56				
14 00.00			14 00.00				
NET PAY DISTRIBUTION							
Start Balance:	80.00	0.00	FLSA Comp	0.00	0.00		
+ Earned:	4.00		Resigned Leave	0.00	0.00		
- Taken:	8.00		MPD/Fire Comp	0.00	0.00		
+ Adjustments:			Universal Leave	0.00	0.00		
End Balance:	76.00	0.00					
15							
Summer Pay Credit - Current Pay Period:		296.26	School YTD:		3,851.74		
MESSAGE:		17					



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IV. Employee Support – Who to Contact For What

Area	Issue	Who to Contact
Employee Self Service	<ul style="list-style-type: none">• Password Resets• Account Lockouts	District of Columbia ASMP Help Desk (202) 727-8700
Personal Data	<ul style="list-style-type: none">• Address Corrections• Tax Data/Allowances	Employees should access the PeopleSoft Employee Self Service System to update personal data.
Benefit Plans and Human Resources	<ul style="list-style-type: none">• Benefit Plans/Records• Benefit Deduction Amounts• Employer Paid Benefits• Grade and step• Salary• Service Dates• General HR inquiries	DCPS Central Human Resources (202) 442-4090
Paychecks / Direct Deposit	<ul style="list-style-type: none">• Net Pay• Direct Deposit Allocations• Garnishments / Child Support• Before Tax Deductions (Pre-Tax Deductions)• After Tax Deductions (Post-Tax Deductions)• Taxes Withheld• Leave Balances• Summer Pay Credit	DCPS Central Payroll (202) 442-5330
Hours & Earnings	<ul style="list-style-type: none">• Regular Hours Paid in the Current Pay Period• Leave Hours Paid in the Current Pay Period	DCPS Central Payroll (202) 442-5330